

June 17, 2009

TO: Teresa Parsons
Director's Review Program Supervisor

FROM: Kristie Wilson
Director's Review Investigator

**RE: Tracy Zuern v. Parks and Recreation Commission (P&R)
Allocation Review Request No. ALLO-08-047**

On April 14, 2009 a Director's Review meeting took place by telephone conference call concerning the allocation of Tracy Zuern's position. Present during the telephone conference call were Tracy Zuern, P&R; Joan Gallagher, WFSE; Joe Vidales, P&R Human Resource Office; George Price, P&R Human Resource Office; and myself.

Investigator's Finding

As the Director's review investigator, I carefully reviewed and considered all of the documentation in the file, the class specifications, and the information provided during the Director's review conference. Based on my review and analysis of Ms. Zuern's assigned duties and responsibilities, I find that the classification that best fits Ms. Zuern's overall duties and responsibilities is the Office Assistant 3.

Background

On October 9, 2007 Ms. Zuern submitted a Classification Questionnaire (CQ) to P&R HR Office (Exhibit A-3). Mr. Vidales reviewed her CQ and issued his decision by letter dated July 2, 2008 (Exhibit A-2). In his letter Mr. Vidales outlined the reasons and basis for his decision. On August 1, 2008 Ms. Zuern filed a request for a Director's review.

Summary of Ms. Zuern's Comments

Ms. Zuern asserts that she has been delegated higher level administrative support duties in support of a WMS position. She explained that she prepares complex documents of a fiscal nature, policies and procedures, and budget work. In addition Ms. Zuern explained that she coordinates the administrative work, manages personnel

records and the Parks telecommunications and computer system. She states that she is the only support person in the area and that she manages the office.

Ms. Zuern states that she is not a supervisor but a lead over the seasonal Park Aides. Ms. Zuern is responsible for the hiring of the Park Aides. She trains them on policies and procedures of the reservation system, emergency policies, money procedures, and handling customer complaints. In addition she creates their work schedule. During this time, she is temporarily upgraded to an Office Assistant Lead.

Ms. Zuern explained her purchasing authority in the office. She states that she tracks inventory and has authority to purchase office supplies and equipment. Major purchases need approval through the Park Manager. Ms. Zuern states that she does not manage contracts.

Ms. Zuern states that although she does not manage the budget, she does the tracking for the Park Manager. She tracks monthly expenditures, verifies and checks for errors, pays utilities, and informs the Park Manager if something does not appear correct. The overall budget authority is the Park Manager's responsibility. Ms. Zuern also compiles the budget into a report for the Park Manager.

Ms. Zuern explained that she has some property management duties in dealing with the historic homes in the park. She has to order specialized supplies for the homes because they are more complex than other areas within the park.

Summary of P&R's Rationale

P&R and Ms. Zuern both agree that the CQ signed October 9, 2007 (Exhibit A-3), is accurate. Mr. Price and Mr. Vidales both explained that the majority of Ms. Zuern's duties are not delegated administrative support items of a substantive nature. They do not feel that Ms. Zuern performs complex clerical duties the majority of the time.

Mr. Price explained that Mr. Evans (Parks Manager) does the day-to-day work of managing and auditing the budget. Although, Ms. Zuern may have signature authority in some areas, the overall budget work is done by the Parks Manager. Mr. Price stated that Ms. Zuern performs reconciliation, verification, and tracking of expenditures by compiling the information and entering into an excel spreadsheet.

Mr. Vidales explained that Ms. Zuern's bidding experience for contracts consists of completing the form within the Park Manager's perimeters. Ms. Zuern does not negotiate the contracts.

Mr. Vidales agrees that Ms. Zuern has some complex duties but he does not see them as higher level administrative duties. He explained that she is not assigned a major

program activity. She is a lead worker who directs seasonal park aides. During this time Ms. Zuern is allocated to an Office Assistant Lead nonpermanently. The reason she is not allocated to this position permanently is because it is not year-round. P&R wanted to at least recognize Ms. Zuern higher duties during the seasonal period.

Mr. Vidales asserts that the OA 3 distinguishing characteristics such as preparing reports, processing fiscal documents, responding to inquiries with knowledge of policies and procedures, all fit within the Ms. Zuern's job duties.

Both Mr. Price and Mr. Vidales agree the Ms. Zuern's tracking, verifying, and auditing fiscal information is a minor part of Ms. Zuern's job duties. They feel the majority is clerical duties.

After reviewing Ms. Zuern's CQ, it was determined that the best fit for Ms. Zuern's position is an Office Assistant 3 and allocated nonpermanently to an Office Assistant Lead during seasons.

Reason and Basis for Finding

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. See Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

The definition for Administrative Assistant 3 class states:

Positions perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor.

While Ms. Zuern does perform some administrative duties, the majority of her duties are clerical in nature. I have reviewed the written documentation and the CQ for Ms. Zuern and conclude that Ms. Zuern's duties do not rise to the level of an Administrative Assistant 3 classification.

The definition for Office Assistant 3 states:

Under general supervision, independently perform a variety of complex clerical projects and assignments such as preparing reports, preparing, reviewing, verifying and processing fiscal documents and/or financial records, composing correspondence such as transmittals and responses to frequent requests for information, establishing manual or electronic recordkeeping/filing systems and/or data base files, and responding to inquiries requiring substantive knowledge of office/departmental policies and procedures. Positions may perform specialized complex word processing tasks in a word processing unit or complex rapid data inquiry and/or entry functions.

The focus of Ms. Zuern's position involves 40% administrative support to the area Park Manager and park staff, which includes acting as an intermediary between park manager and park staff. Ms. Zuern communicates park policies, procedures and regulations to park staff, other agencies, and the public. Ms. Zuern coordinates with region staff on administrative practices and procedures, tracks park expenses and report fiscal status and trends to the Park Manager.

Although Ms. Zuern has some duties that fall within the Administrative Assistant series, the bulk of her assigned work involves complex clerical tasks. Therefore, I believe the scope of her assignments fall within the Office Assistant 3 classification.

As previously noted by the Personnel Resources Board (PRB), the guidance provided in the Department of Personnel's Classification and Pay Administrative Guide establishes that the following standards are primary considerations in allocating positions:

- a) Category concept (if one exists).
- b) Definition or basic function of the class.
- c) Distinguishing characteristics of a class.
- d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

After reviewing the documentation and comments from all parties with regard to Ms. Zuern's assigned duties and responsibilities, I conclude the Office Assistant 3 classification best describes Ms. Zuern's position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to the Washington personnel resources board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

Please note the following changes:

June 26 through July 3 the offices of the Director's Review Program and Personnel Resources Board Appeals Program will be moving to the Department of Personnel building located at 600 South Franklin in Olympia. Starting June 26, 2009, the main phone number for the two programs will be **360-664-0388** and all requests for Director's Reviews and appeals to the Personnel Resources Board must be filed:

In person at:

**600 South Franklin
Olympia, WA 98504-7530**

OR

By mail at: (unchanged)

**Mail Stop 40911
Olympia, WA 98504-0911**

The fax number remains the same - **360-753-0139**.

If no further action is taken, the Director's determination becomes final.

cc: Tracy Zuern, P&R
Joan Gallagher, WFSE
Joe Vidales, P&R Human Resource Office
George Price, P&R Human Resource Office
Lisa Skriletz, DOP Classification and Pay Manager

Enclosure: Exhibit list

Exhibit List

A. Filed by employee August 1, 2008:

1. Director's Review Form.
2. July 2, 2008 P&R allocation determination.
3. October 2007 CQ, position #1064.
4. July 17, 2008 letter of support from Donald Powell.

B. Filed by P&R October 30, 2008:

1. Denial Letter dated July 2, 2008:
2. Classification Questionnaire signed & dated
3. Memo from Steve Brand to George Price, submitted with the reallocation request
4. Classification Spec for Office Assistant 3
5. Classification Spec for Administrative Assistant 3
6. Employee allocation review request for Director's Review
7. Exhibit due date extension email

C. Forwarded by P&R October 30, 2008:

Employee Exhibits

1. Request for Director's Review
2. Letter dated July 2, 2008 from Joe Vidales HR, Parks Denied Reallocation
3. Classification Spec for Office Assistant 3
4. Classification Questionnaire- Tracy Zuern
5. Classification Spec for Administrative Assistant 3
6. Declaration of Duties
7. Examples of Administrative Assistant Duties Performed and Organizational Chart
8. Letters of Support
 - A. Evan Roberts, Parks Manager
 - B. Donald Powell, Senior Administrator
9. Brochures
 - A. Historic Vacation Rentals
10. Exhibit Due Dates Documentation
11. February 2007 PDP